



APIs – It's not that difficult **NOW**

Actually Data and Breast Cancer Now for IOF Tech Conference

Who are we?

- ▶ Anthony Fawkes – Independent database consultant
 - ▶ Been in the sector for about 15 years
- ▶ Lisa Fields – Senior Database Officer
 - ▶ Been in the sector for 20+ years
- ▶ Jemima Marchant Smith – Supporter Engagement Manager
 - ▶ Been in the sector for 5 years
- ▶ All in all – We're passionate about data and processes and people

Who are you?

Sorry there is audience participation in this presentation!

- ▶ Fundraisers
- ▶ Database People
- ▶ Finance People
- ▶ Senior Management
- ▶ Consultants

Have any of you used Power Query Before?

What we're going to cover

- ▶ What is an API
- ▶ What APIs are available
 - ▶ Online Giving Platforms
- ▶ JustGiving Front End API
 - ▶ How to get it
 - ▶ JustGiving Backend API
- ▶ CASE STUDY FOR BREAST CANCER NOW
 - ▶ Challenge
 - ▶ Solution
 - ▶ Next Steps


What is an API

- ▶ An API is
- ▶ What you need to bear in mind



Example Organisational APIs

JustGiving™

 everydayhero

engaging NETWORKS

JustGiving APIs

- ▶ How to get it - Data APIs need turning on by support and a login to Charity account – developer.justgiving.com
- ▶ DOCUMENTATION
 - ▶ Front end - <https://api.justgiving.com/docs/>
 - ▶ Data APIs - <https://dataapi.justgiving.com/docs/>

Front End API	DATA API	Differences / Notes
<u>GetFundraisingPages</u>	<u>pagesCreatedWithDates</u>	Front end has user story back office doesn't
<u>GetCharityById</u>		
<u>RetrieveDonationDetails</u>		
<u>GetCharityDonations</u>	<u>paymentsListWithDates</u>	Two Stage process tell me the list of payments
<u>GetFundraisingPageDetails</u>	<u>getPaymentById</u>	Give me the transactions in a payment

CASE STUDY – BREAST CANCER NOW

- ▶ Challenge
 - ▶ Data Team (Pages)
 - ▶ Manual Processes
 - ▶ Fundraisers not aware of the impact of being involved in the process
 - ▶ Fragmented Process
 - ▶ Supporter Care (Gift Imports) 1.5 days
 - ▶ Inherited laborious / overly complex process
 - ▶ Used MS Access and split the output into at least 6 exports
 - ▶ When it broke only 1 person who knew how to fix it and couldn't be modified for new changes within the organisation
 - ▶ Take up to 1.5 days to complete 1 import (Just JG) – Was just about getting data from CSV to CRM
- ▶ DOUBLE THE WORKLOAD DUE TO THE MERGE

CASE STUDY – BREAST CANCER NOW

➤ Solution

➤ Split Process

- (Page Creation) 2 teams involved + Fundraisers
- (Payments)
- (Gift Aid)

➤ Why Excel

- Latest Version of Excel has power query embedded into it.

Why is Power Query useful

- ▶ It replaces the need for macros as it works through a series of steps
- ▶ Has its own language (M code)
- ▶ Has its own JSON parser (a structure of data returned from APIs)

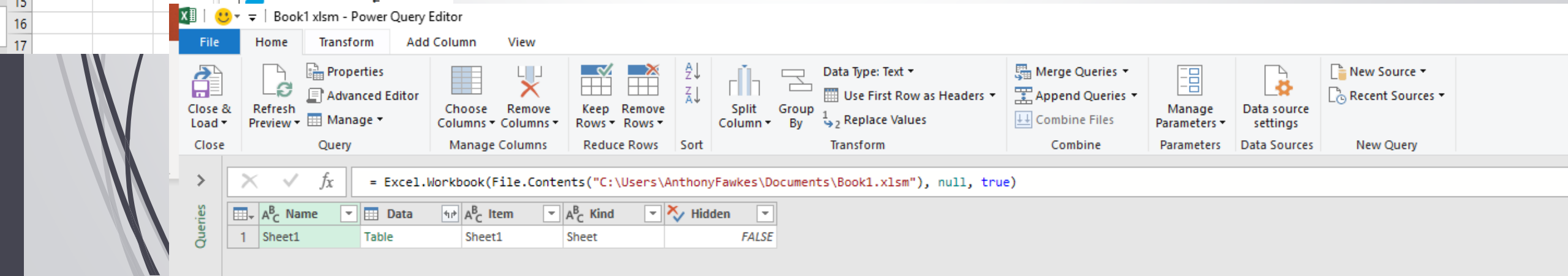
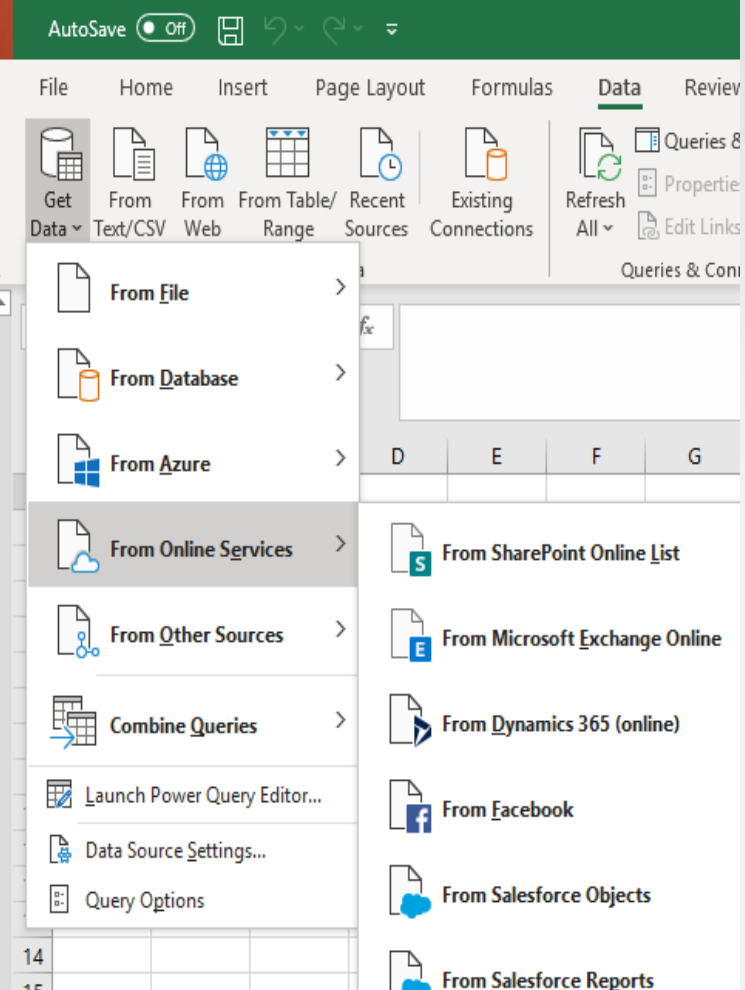
Things you can do

Get Data from almost anywhere including the web

Stick files and tables together with ease

Remove Columns

Create New Columns



Power Query Gotcha's

- ▶ Oath2 APIs
- ▶ SOAP APIs
- ▶ remember to not enable background tasks

- ▶ Data Model
- ▶ Refreshing the query
- ▶ SAME AS POWER BI

- ▶ Microsoft have been investing in this area of their business for ages

Power Query and JustGiving Data

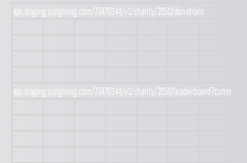
Process For New Fundraising Pages

- API call is carried out by the IT Team to get new fundraising pages.
- They are stored in this folder:
T:\FR_SO\Data\Imports\JustGiving\Reports
- The latest reports need to be moved into the **AD Process** folder (There should be two reports 1 for each charity) - **MANUAL PROCESS**
T:\FR_SO\Data\Imports\JustGiving\Reports\AD Process
- Click on this button to refresh the All Page Data sheet - this would be based on the reports in the AD Process folder
[Refresh All Pages](#)
- A box will appear saying that the queries have been refreshed.
- This button will take a copy of the active pages for coding and save it to a folder
[Copy Active Pages](#)
- This is now circulated to fundraisers to code up the pages.
- If a page should not be coded in RE then please add CARE to all Custom Codes (Columns C-H)
- Once the pages have been coded import you can load them back in here
The filename should be todays date if not change this date: 10/10/2019
The CARE pages from the Import File
[Refresh Coded Pages](#)
- Now we need to export this coded pages ready for importing into RE
[Export pages for RE](#)
- File to import will be called todays date with "_PagesToImport" eg: JG_2019-07-29_PagesToImport
- Manually update the **All Coded Pages** tab to fill in any missing codes for the coded pages
[Copy CARE Pages](#)
- Create a file of Care Records - THIS IS ONLY REQUIRED IF THERE ARE SOME CUSTOM CODES WITH CARE IN THEM
- Push cc for coded pages
Push cc for cancelled pages
[BCN Send CC to JG](#) [CARE Send CC to JG](#)
[BCN Cancelled to JG](#) [CARE Cancelled to JG](#)

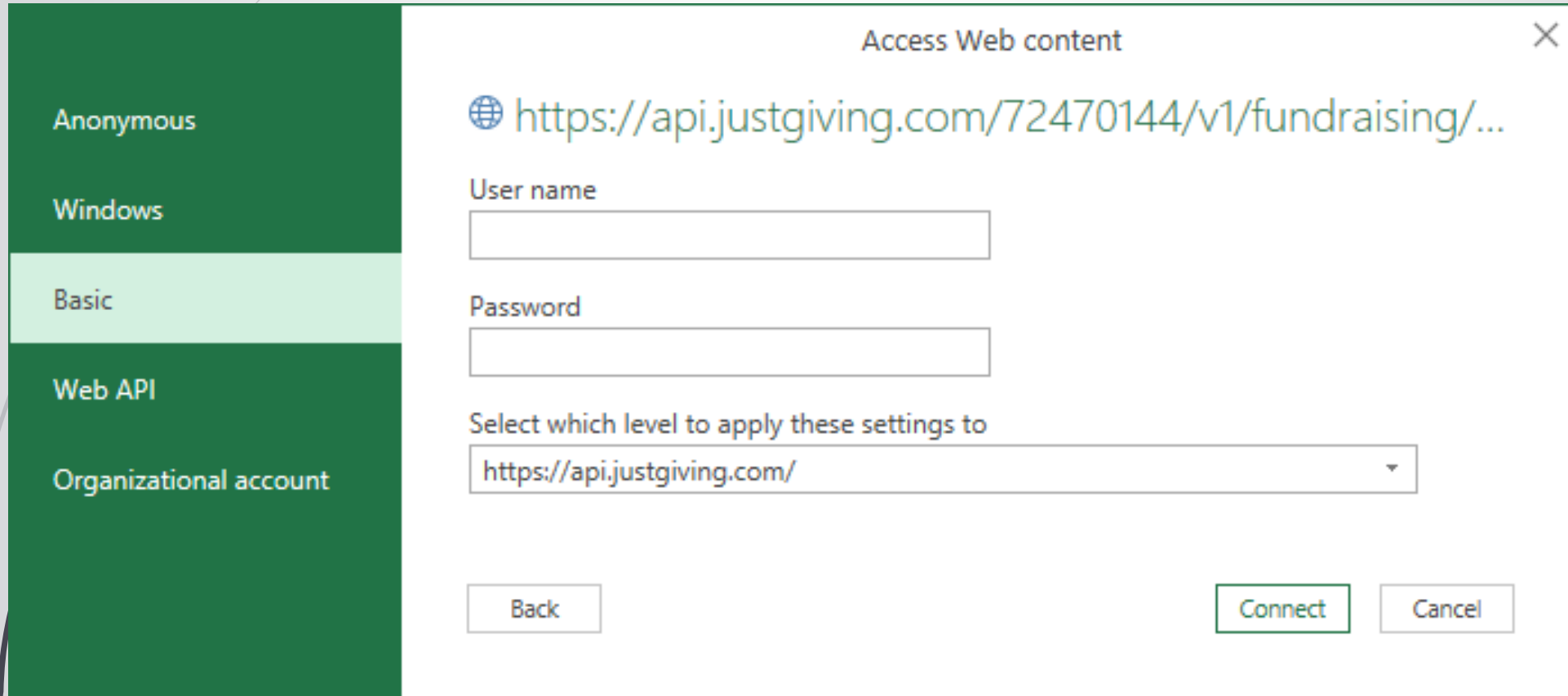
Process Sheet | All Page Data | Active Pages for Coding | Not Active Pages for Checking | All Coded Pages | To Be Coded | CARE PAGES | CARE CC Active | CARE CC Cancelled | BCN CC Active | BCN CC Cancelled

API Security

Demo



https://api.justgiving.com/72470144/v1/fundraising/...



Access Web content

<https://api.justgiving.com/72470144/v1/fundraising/...>

User name

Password

Select which level to apply these settings to

Back Connect Cancel

Navigation menu (left):
Anonymous
Windows
Basic
Web API
Organizational account

CASE STUDY – BREAST CANCER NOW

- ▶ Improvements
 - ▶ Supporter Care
 - ▶ Improved working life (Time Efficient)
 - ▶ Doesn't take a morning now
 - ▶ User Friendly processes and not complicated
 - ▶ Most team members can do the process (Any team member can now process this data)
- ▶ CODING NOW PUSHED BACK TO FUNDRAISING TEAMS WHO ARE THE EXPERTS ON THEIR FUNDRAISERS
 - ▶ Database Team - 0.5 hour
 - ▶ Mechanism to catch pages on “Wrong” Charity Account
 - ▶ Increased knowledge
 - ▶ Gift and Gift Aid Imports will be automated using scheduler (previously taken around 1.5 days)
 - ▶ Better Collaboration for CARE and BCN Data Teams
 - ▶ Not reliant on external support

Practical Support

- ▶ Web Support

- ▶ Microsoft - <https://support.office.com/en-gb/article/Introduction-to-Microsoft-Power-Query-for-Excel-6e92e2f4-2079-4e1f-bad5-89f6269cd605>
- ▶ Amazon - <https://www.amazon.co.uk/Power-Query-BI-Excel/dp/1430266910>
- ▶ Blog - <https://blog.crossjoin.co.uk/category/power-query/>

How Actually Data can help

Excel Training Refresher (formulae and top tips)

Formulae

Top Tips

Excel Training Advanced

Pivot Tables

Advanced formulae

Power Query basics

One to One support for a specific business task or process

Next Steps

Check what version of Excel you have


Document your current process

**Please speak to your IT Teams if required to install software*

How to find out your version of Excel

Account

User Information

 Anthony Fawkes
anthony@actuallydata.com

[Change photo](#)
[About me](#)
[Sign out](#)
[Switch Account](#)


Office Background:

Stars

Office Theme:

Dark Gray

Connected Services:

 OneDrive - Personal
anthony@actuallydata.com

[Add a service](#)

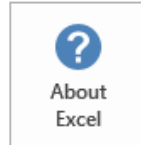
Product Information



Product Activated

Microsoft Office Professional Plus 2013

This product contains



About Excel
Learn more about Excel, Support, Prod

About Microsoft Excel

Microsoft® Excel® 2013 (15.0.4815.1000) MSO (15.0.4815.1000) 64-bit
Part of Microsoft Office Professional Plus 2013

Product ID: 00216-27961-76428-AA234
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Chinese (Simplified)
New Experience Input Style and Classic Input Style, developed by Microsoft Corporation based

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[OK](#)
[System Info...](#)
[Tech Support...](#)

- ←
- Info
- New
- Open
- Save
- Save As
- Save as Adobe PDF
- Print
- Share
- Export
- Close
- Account**
- Options

Questions



Stay in Touch

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- ▶ <http://www.actuallydata.com>
- ▶ [@actuallydata](#)

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Thanks

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Thank You